Concierge Web Admin Guide

Last Revised August 26, 2016

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What's New

•Removal of Try-on Queue

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Access to Concierge Web Admin

Every Apple Retail employee has the ability to log in to Concierge admin. Additional features are auto-provisioned by Merlin role. If additional access is needed, please parter with your leadership team and apply for access via accessmanager.apple.com.

Store Service Hours

Configurable by Lead Genius, Store Admins, Manager+

Store service hours define when certain Concierge services are offered to customers. Store Service hours are set independently of your Store operating hours (sams.corp.apple.com). You must set hours for each day of the week.

In most cases Store Service hours will mirror your store's normal operating hours. Store Service hours affect Genius Bar, Setup, Personal Training, Try On, Workshops, and JV queue types.

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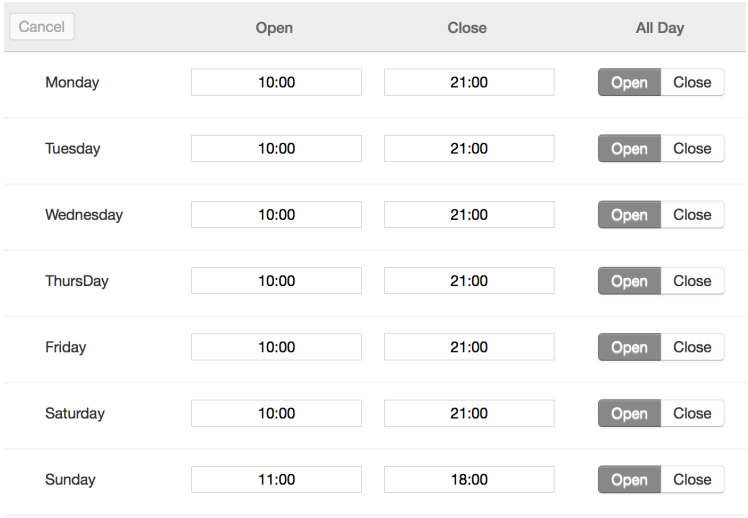
Setting Store Service Hours

To change the time simply click into the box for the appropriate day and enter the desired opening time in 24-hour format. Press the save button to record the change. All times are in 24 hour format.



Service Hours Opening Time

This time determines when your Store will offer reservations to customers. This time impacts when reservations are available to book for customers via getsupport.apple.com (CAS), The Apple Store app, Concierge Mobile and AppleCare.

Note: By default you are able to create walk-in appointments one hour before your Store service hours are set to begin. This allows to start creating same day appointments for customers who arrive prior to Store opening. Partner with your field leader if you have any questions.

Service Hours Closing Time

This time should be set to when you will no longer offer reservations of any type to customers. Store closing time will parallel SAMs hours.

Store Service Open or Closed

If your store is closed on any day of the week you can close your store service times. This will ensure no availability is shown to customers. Click Open or Close to select the status for the day. Then click save to keep the change.

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Example

A store has regular opening hours of Monday to Saturday 10:00–21:00 and Sunday 11:00–18:00.

They set their store service times to:

Monday–Saturday: 10:00–21:00
Sunday 11:00–18:00

They will be able, by default, to book walk-in Genius Bar and Watch try-on appointments starting at 9:00 a.m. Monday to Saturday and 10:00 a.m. on Sunday.

Application and Hardware Skills

Setting application and hardware skills are critical for creating capacity for the Genius Bar and One to One sessions.

Capacity is created by scheduling an employee with the desired job task in Kronos and that employee having the correct Application or Hardware Skills. (i.e, an employee scheduled in PT30 that does not have any application skills will not create any reservations for customers to book.)

For Genius Bar sessions capacity is a combination of Kronos scheduling and Hardware skills. If an employee scheduled for the Genius Bar does not have the matching hardware skills quoted wait times will be inaccurate and employees will not be assigned sessions as expected.

Application and hardware skills can be added by managers in the Employees section.

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Auto Provisioning

Initial hardware skills are auto-provisioned by Merlin role.

Genius Bar:

Mac and Mobile skill sets determine what session types can be assigned to an employee.

Mac Hardware skill:
Mac
Time Capsule and Airport

Mobile Hardware skill:
iPhone
iPad
Watch
Beats
Apple TV

Family Room Specialists are automatically provisioned with the Mobile skill. Geniuses are automatically provisioned with the Mac and Mobile skill. For any other employee that will be scheduled in FRMobile or FRMac job tasks add the corresponding hardware skill to them.

For example, a Red Zone Specialist who is Mobile certified should have the Mobile skill set added to them.

Personal Training:

The applications available mirror the topics we offer for our customers to book.

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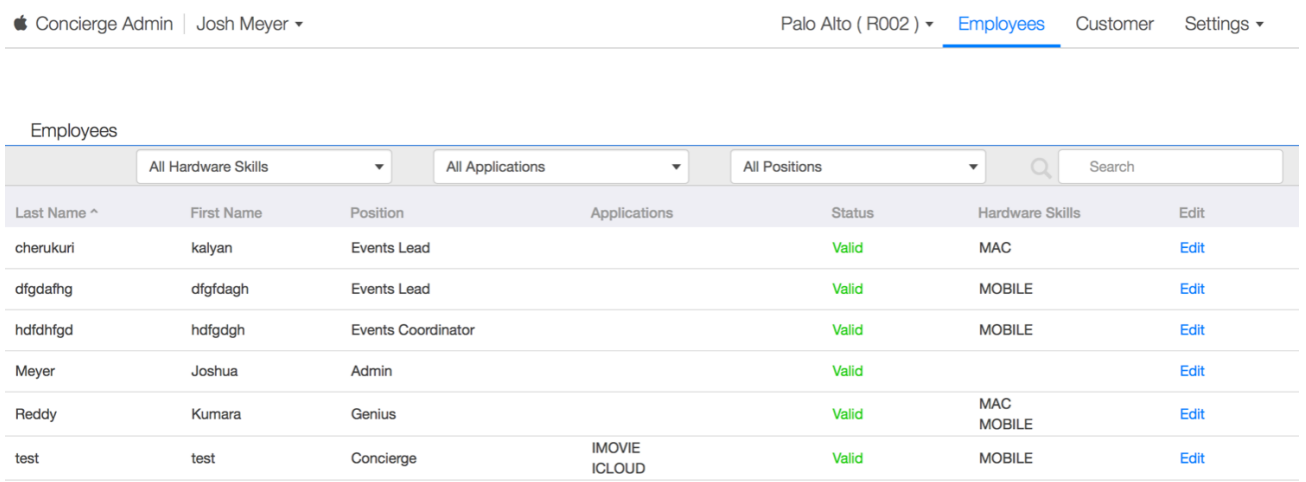
Creatives: Add the appropriate skills for what each creative is capable of teaching.

Any other employee scheduled to deliver training sessions needs to have the applications they are qualified to teach added via the employee section.For example, a Family Room Specialist who can teach GarageBand needs to have GarageBand added to their skill set or no availability will be shown to customers.

Note:
Auto provisioned skills cannot be removed.

Editing Hardware Skills



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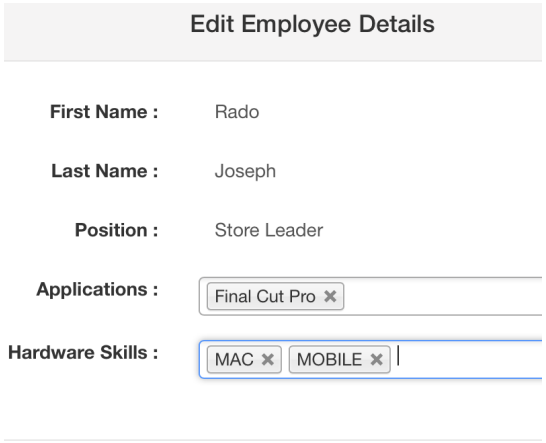
Find the employee you wish to edit. (You can filter employees by position or use the search bar to filter by name.)

Click the edit button to the left of their name.

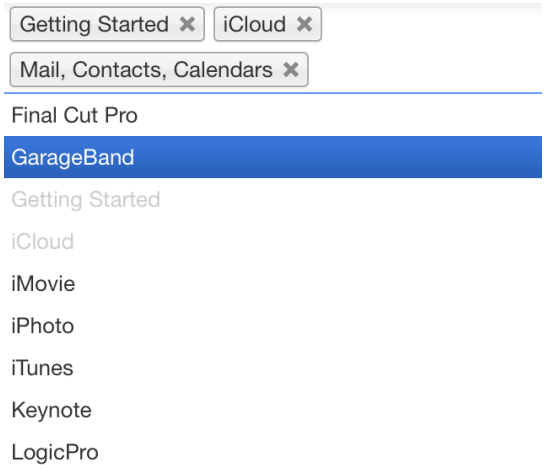
You can validate skills by sorting by a particular skill type.

Once you have selected edit, click in either applications or hardware skills.

A drop-down menu will display, you can filter by beginning to type and can select as many skills at a time as desired.



Press save to confirm the changes. To remove a skill, press edit, click the "x" next to the skill for removal and press save.



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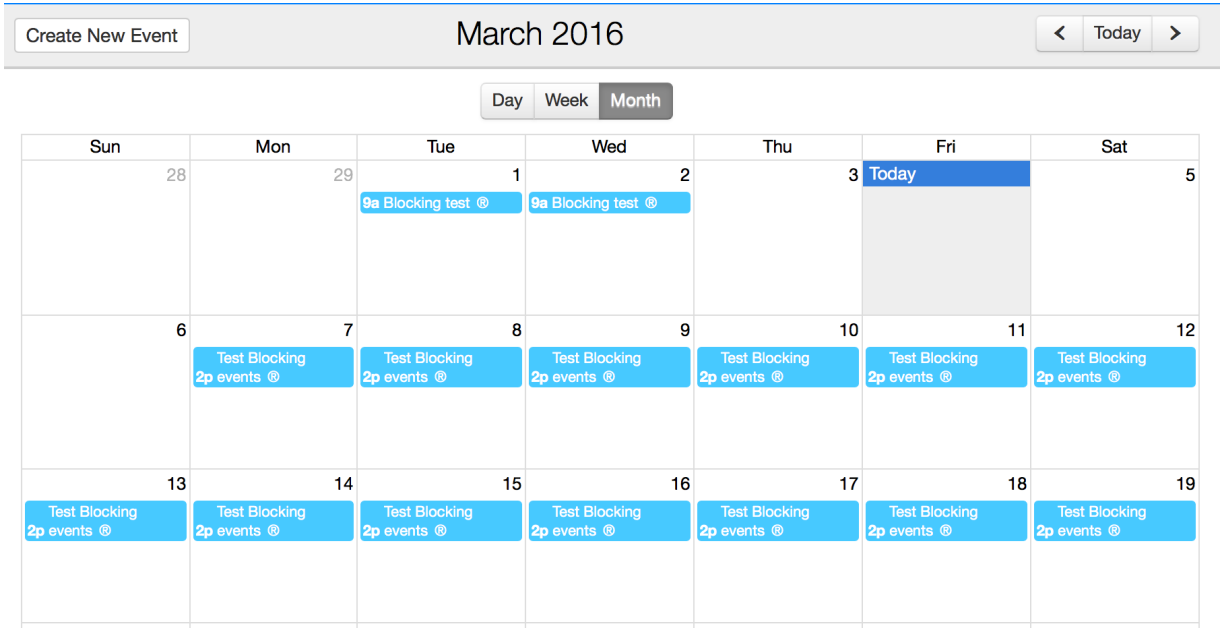
Event Blockers



Event Blockers are used to block reservations from being booked into specified queue(s) for a set period of time. They can be set to repeat for up to 60 days.

Event Blockers are commonly used for the Family Room Reset. And when directed by Global Retail Support.

Note: If you have questions about blocking event usage, discuss with your Store Leader and/or Field Leader.

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Viewing Event Blockers

You can filter which Event Blockers are displayed by checking or unchecking the queue types on the left hand side of the page

You can also view Event Blockers by day, week or month by making your selection using the toggle in the center of the calendar.

Creating a Event Blocker

Click settings and select Event Blockers.

Click to add "Create New Event" in the upper left-hand corner of the blocking event calendar.
Choose a name for the blocking event, for example,"Family Room Reset."

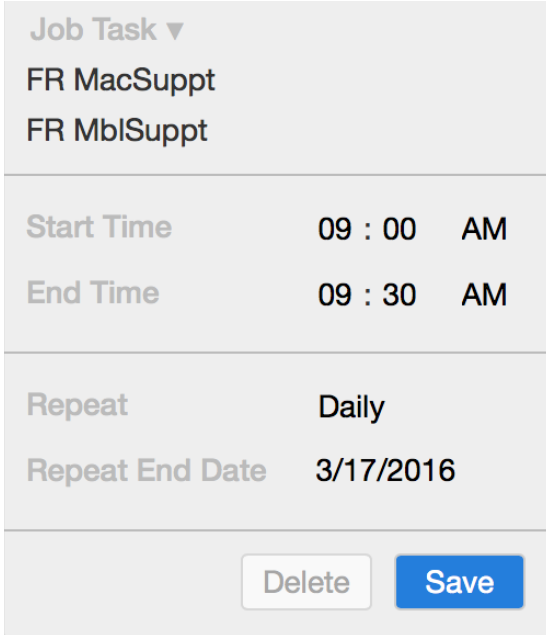
Choose the date for the blocking event.

Select the job task(s) you desire the event to block. To select more then one task simply keep selecting tasks. (To remove a selected task, move the curser away from the drop-down menu and then press the "X" next to the task name.)

Select the start and end time of the blocking event.

Decide if you would like the event to repeat (daily, weekly, monthly).

Press save.



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Deleting a Event Blocker

Navigate to the day you wish to remove the blocking event for. Click the blocking event you wish to remove.

Click delete. If it is a reoccurring blocking event, you will be given the option to delete the event just for that day or the entire reoccurring event.

Event Blocker History

Click "view history" to see edits made to Event Blockers. By default the last 10 changes are displayed. If you wish to see older changes you may search a specific range of dates. The history will show you want employee made the change and what was changed.

Event Blocker Repeating Event Email

When an Event Blocker has a week or less left before it expires you will get a reminder email to your store inbox. This email lets you know that to continue block the time you have set you need to create a new event blocker.

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Troubleshooting Concierge

If you experience problems with the Concierge system, verify the system is connected to Apple's internal network. Verify your Concierge staffing, and service hours are set properly.

If the problem persists, open a ticket by calling the IS&T HelpLine:

- U.S. and Canada: Call 800-800-6272, 24 hours a day, 7 days a week.
- AsiaPacific: Call 65-64807002 from 8:00 a.m. to 6:00 p.m. Singapore time, Monday through Friday.
- Europe: Call +44 (0)20 8218 1010 from 8:00 a.m. to 6:00 p.m. GMT, Monday through Friday.
- Want to send feedback? Select the Concierge app in Switchboard and tap Send Feedback.
- For any questions regarding Workshops, Camps, or events, please contact retailmarketing@apple.com.

For access requests, go to Access Manager at accessmanager.apple.com.

Note: *When an employee changes position or Store location, their Concierge access is updated when the change is made in Merlin. Check with a manager to see if this change has been completed before using Access Manager to request access.*

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Navigating the Menu Bar

The menu bar contains the major functions of Concierge Admin and allow you to navigate through the site. Moving your mouse over the names will trigger pull-down menus with more options.

"Your Store Name"

- Workshops- For adding and editing workshops.
- Company training- For scheduling JV trainings.
- iReserve- For managing iReserve in the store.

Employee Menu

- Employees – Tool to view position and manage Hardware and Application skills.

Customer

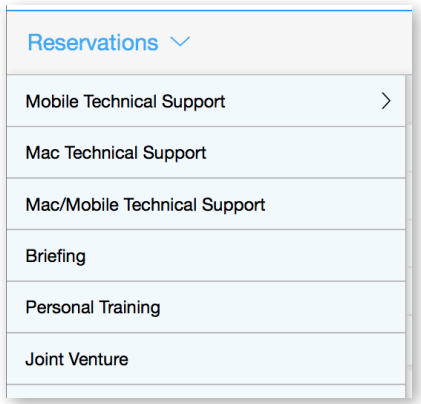
- Customer- Tool for customer search and membership management

Settings

- Event Blockers
- Store Settings
- My Settings

Workshops

- **Joint Venture Workshop** displays any Workshops requested and scheduled for Joint Venture members.
- **Open Training** displays opening training sessions for the Store.
- **Special Events** displays any Special Events planned and scheduled for the Store.
- **Standard Workshop** displays a list of consumer workshops.
- **Camps** displays any Camp sessions that have been planned and scheduled.



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Membership Management

Membership Terms

A member is a customer who has joined One to One or Joint Venture. Each membership is valid for one year from activation. Review the program terms and conditions for more information:

- http://www.apple.com/retail/learn/one-to-one/terms.html
- http://www.apple.com/retail/jointventure/terms.html

Membership Sales

Joint Venture memberships are sold through EasyPay as an activation code.

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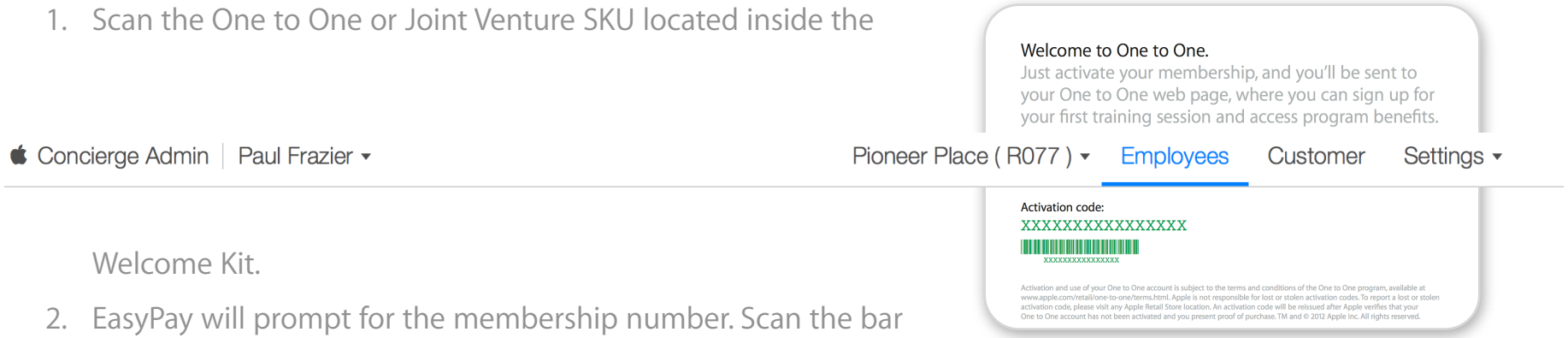
1. Scan the One to One or Joint Venture SKU located inside the Welcome Kit.


Welcome to One to One.
Just activate your membership, and you'll be sent to your One to One web page, where you can sign up for your first training session and access program benefits.
Concierge Admin
Paul Frazier
Pioneer Place (R077)
Employees
Customer
Settings
Activation code:
XXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXX
Activation and use of your One to One account is subject to the terms and conditions of the One to One program, available at www.apple.com/retail/one-to-one/terms.html. Apple is not responsible for lost or stolen activation codes. To report a lost or stolen activation code, please visit any Apple Retail Store location. An activation code will be reissued after Apple verifies that your One to One account has not been activated and you present proof of purchase. TM and © 2012 Apple Inc. All rights reserved.

2. EasyPay will prompt for the membership number. Scan the bar code located on the bottom of the activation card.
3. When completing the transaction, be sure to capture the customer's name, and email address or mobile phone number (at least one is required, having both is preferred).
4. Insert the card and the appropriate take one into the Welcome Kit and present it to the customer.

Membership Renewal

Joint Venture

Joint Venture members may renew their membership annually. There is no limit to the number of times a customer may renew their membership. Customers inquiring about Joint Venture membership renewal should be directed to a Business team member.

Membership Administration

Concierge Admin contains membership information for all customers who have purchased a membership in an Apple Retail Store (e.g., One to One and Joint Venture) and can be used to manage all aspects of a customer's membership.

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The ability to change information about the customer's membership is dependent upon the user's access level in Concierge Admin.

Definitions

- **Customer** – A customer is anyone who has made a reservation through Concierge.
- **Member** – A member is someone who has joined the Joint Venture or One to One program.
- **Company** – A company is an organization that is registered under our Joint Venture program. !

Searching for a Customer, Member, or Company

The customer search function allows you to enter criteria that will help you find the customer, member, or company that you're looking for.

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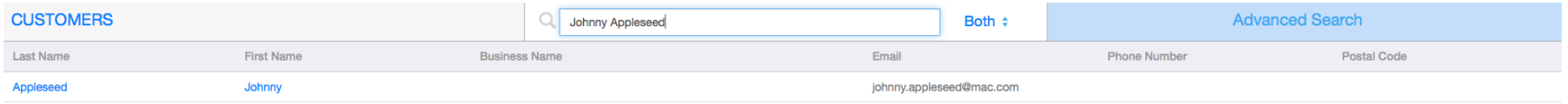

To search for a customer, member, or company:

1. From within Concierge Admin, choose Customer from the menu bar.
2. Enter your search criteria in the search field. This can be name, email address, member number, phone number, etc. The search query will return the top 100 results. For company searches, you can search against details for any member of the company or by the company name itself.
3. To narrow your search even further, click Advanced Search to choose from 11 different search criteria. You can continue to add different search criteria until you have found the member or customer.
4. Click the customer's first or last name to access their membership information. If an associated business name appears as a hyperlink in the search results, clicking that will take you to the Joint Venture company management page.

   Note: *By default the search looks for both members and customers. You can narrow the results by choosing one or the other on the Search line, then searching again.*

The Customer Record

The customer record screen has three components:

- The customer details sidebar displays general information about the customer, including contact information.

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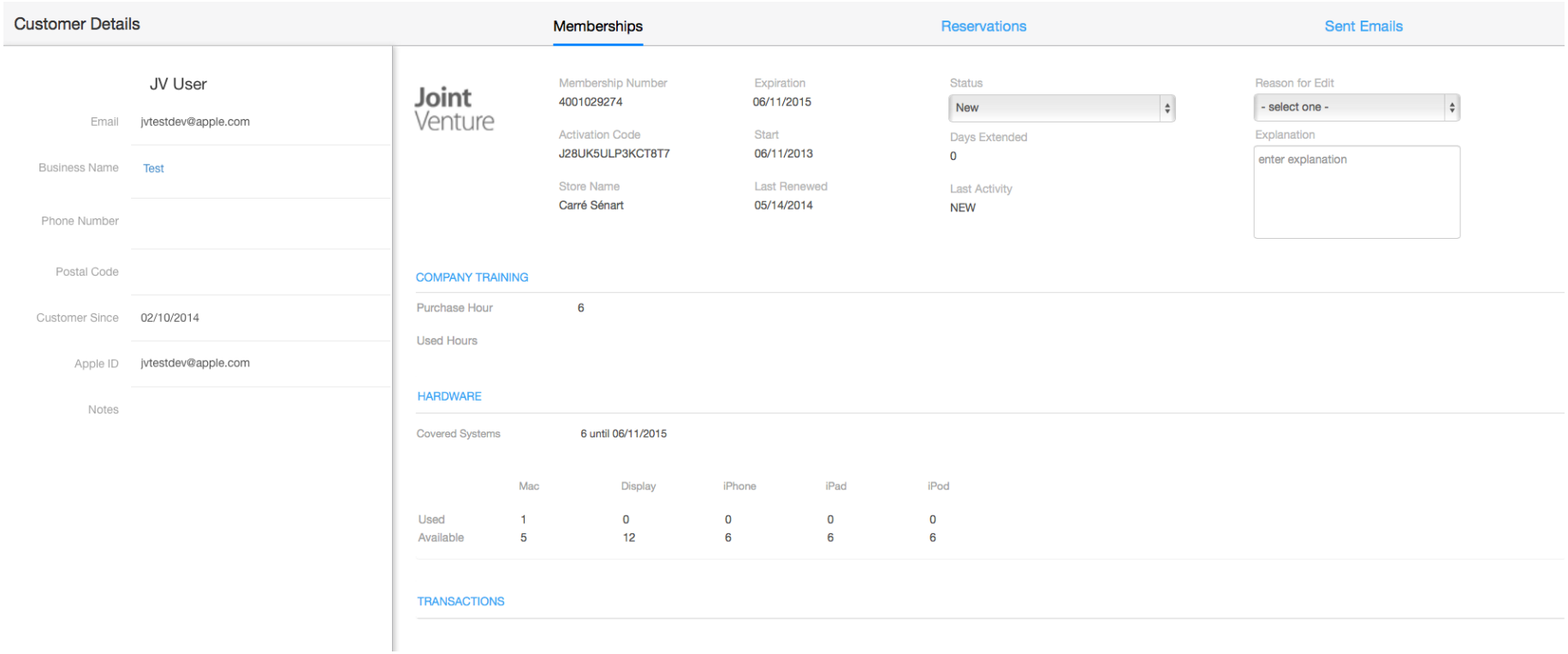
- The tabbed browser provides one-click access to details about the customer's membership and relationship with Apple.
- The main window displays information accessed through the tabbed browser.



Customer Details Sidebar

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The customer details sidebar displays the customer's first and last name, business name, email and phone contact information, zip code or postal code, start date, and Apple ID, if applicable.

Modifying Member Details

Concierge allows you to quickly modify member details by clicking their information. Also included is a notes field where you can enter general comments about a specific member that is visible to anyone who views that member's profile.

To modify customer details:

1. Search for the member whose details you would like to modify and click their name to view the Customer Details.
2. Click any field of the member information to make changes. You can also add to or change the notes field.
3. Click the Save button when finished.

***Note**: If an Apple ID has already been paired with a membership record, you will not be able to modify the customer details in Concierge. The customer can update their own contact information by clicking the "Edit Profile" link on the Joint Venture or One to One member page or by visiting http://appleid.apple.com.*

Memberships

Clicking the Memberships tab will load the customer's active memberships in the main window below. From here, you can perform different tasks on the membership, depending on its type.

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One to One Membership Management

From the One to One membership window, you can view the member's transaction history or change some details about their membership in partnership with a manager.

View Transactions

TRANSACTIONS

Date	Type	Reason	Store#	Employee	POS Trans ID	Start	Expiration	Description	Days Extended
05/14/2014 07:25 PM	Sale	Base Membership Renewed	R381						
05/14/2014 07:25 PM	Sale	Uplift Sale	R381						
06/11/2013 01:58 PM	Status Changed	Base Membership Activation	R438	UNKNOWN			06/11/2014	Old: NEW New: ACTIVE	0
04/04/2011 06:49 PM	Sale		R999						

Concierge allows you to view membership POS transaction details by clicking the Transactions button for Joint Venture memberships or One to One memberships. This will allow you to easily identify things such as the date and time the membership was sold as well as the POS number and the Store in which the transaction took place.

Joint Venture Membership Management

Company Detail View

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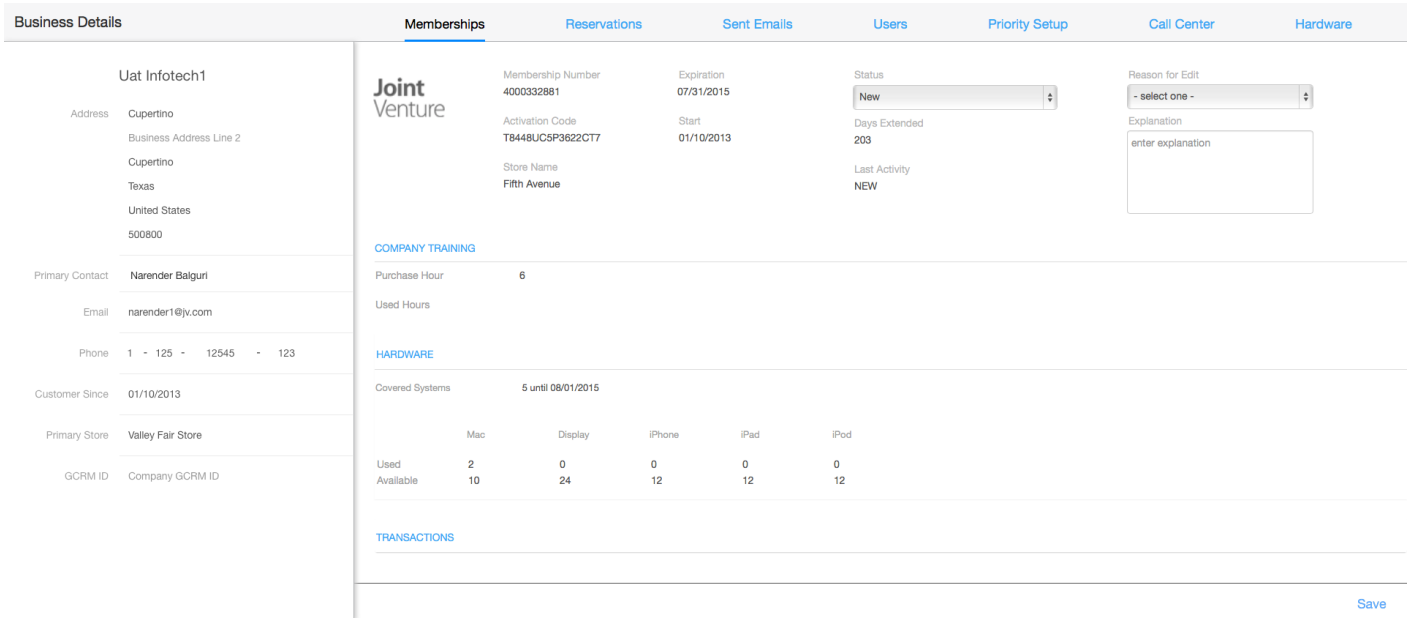
The company detail view, accessible by clicking any Business Name that is hyperlinked, is where you'll be able to manage systems, users, and other details of a Joint Venture membership.



Memberships

Clicking the Memberships tab shows you details about the company's Joint Venture membership in the main window. From this window you can view the Audit Log for the membership, change the membership's status, extend or otherwise edit the expiration date for the membership, and view details about the member company's usage of company training hours and covered systems.

Transactions

An audit log is accessible by clicking the Transactions button. The pop-up window shows all membership transactions, including the original sale, base membership activation, activation of additional systems, and expiration date changes.

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Editing the Membership Expiration Date

In certain circumstances, you may need to edit the expiration date for the Joint Venture membership. Managers may extend the expiration date of a membership by up to 30 days. To do so, either enter the new expiry date in the expiration date field or use the date picker by clicking the calendar icon. Next, choose a reason for the edit and enter a brief explanation for the change. When you click Save, the company's expiration date will be updated.

Reservations

The Reservations tab shows you a paginated view of all in-Store reservations and workshops made by any user associated with this member company. This view does not include Call Center reservations or Priority Setup services.

Users

From the Users tab, you can view all users associated with the company's membership, edit user role and status, and add or delete users to the company record.

First Name	Last Name	Email	Phone	Role	Status	Apple ID	Preferred Store
Testing	UAT	uattest@jv.com		Admin	Invited		
Narender Rao	Balguri	test@jv.com		Admin	Invited		
narender Rao	B	user@uat.com		Employee	Invited		
Test	uat	uat@testing.com		Admin	Active	uat@testing.com	Valley Fair Store
Narender	Balguri	narender@jv.com		Admin	Active	narender@jv.com	Valley Fair Store

1 - 5 of 11 results

Page 1 of 3

Editing User Role and Status

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You can change the user's access level and status directly in Concierge. To do so, simply select the user you'd like to edit, and check or uncheck the Admin and/or Active check boxes.

Caution: *Admin users have additional privileges on the Joint Venture website, including adding and removing users, requesting company training, and managing systems. Changes to Admin status may only be made at the request of a current Admin user of the company and in consultation with your Business Manager.*

Adding and Deleting Users

To add a user to this company, click the Add (+) button in the lower left corner of the main window. Enter the new user's contact information, chose whether or not they will have Admin privileges, and click Send Email. Once the new user receives the email, they will be able to complete the activation process.

To delete a user, select the user you would like to delete, then click the Delete User button.

Priority Setup

The Priority Setup tab shows all previous priority setup service provided to users associated with this member company.

Call Center

The Call Center tab displays all call center service activity made by this company. You can also create a call center reservation for this company directly from this tab.

Creating a Call Center Reservation

To create a call center reservation, click the Create Call Center Reservation button. On the next page, enter the details for the reservation and click Save to book the reservation.

Note: *Use the member's Apple ID when booking the reservation to quickly fill in information and make the call times available.*

Hardware

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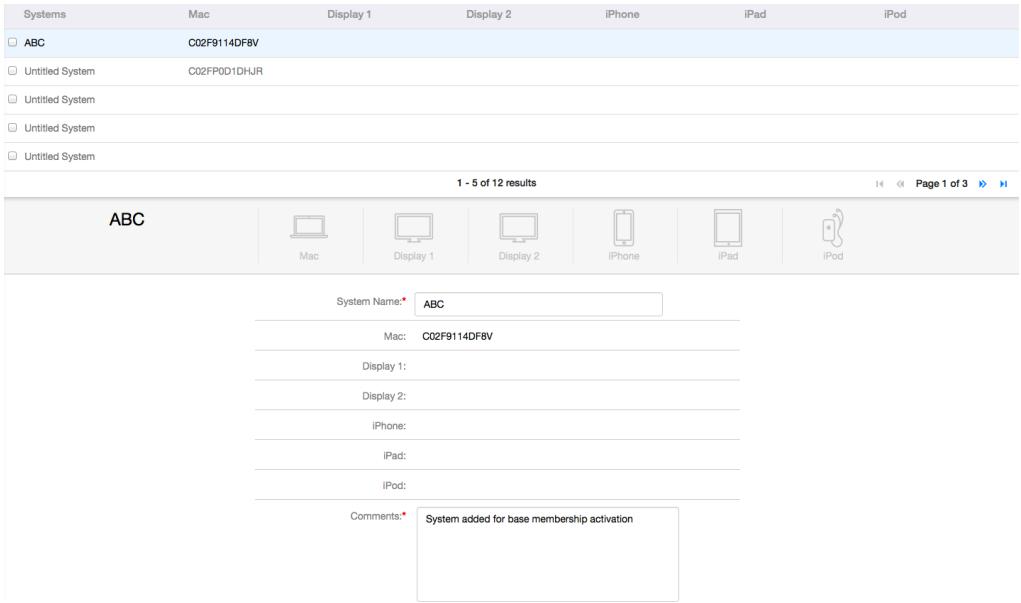
From the Hardware tab, you can add and remove eligible hardware to and from the company's covered systems, edit system names, and delete systems.



Adding and Removing Hardware

To add or remove products from a covered system, first click the system you would like to edit, then select the product you would like to modify. If you're adding or changing products, type the serial number you would like to add and brief comments explaining the edit, then click Save. If you're removing products, simply delete the serial number in the field, add comments, then Save.

Editing system name

You can edit the name of the system for a user. Click the system you would like to edit, enter a new name in the Name text field, and click Save to commit the changes.

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Deleting Systems

In very rare situations, you may need to delete a system slot on a company's membership. Select the system you would like to delete, then click Delete Selected System(s).

Note: *You can only delete a system if the company has more available systems than they've purchased. This scenario only arises if the company returned an additional system after adding hardware to it.*

Customer History

Concierge allows you to view past reservations, sent emails, and product reservations for a specific member or customer. Search for a customer as described above and select the appropriate tabs on the Customer Details screen.

Concierge and Membership Reports

The GBI Portal of the Family Room Dashboard has robust One to One membership reporting tools. Partner with your Store leadership or Family Room leads to use the "O2O Membership" tab of the Family Room Dashboard.

From there you will be able to view various reports on One to One members, their participation, contact, and renewal information.

Workshops and Open Training

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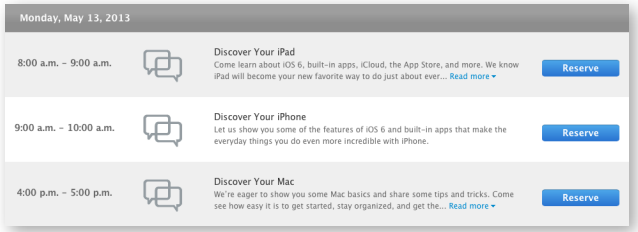
Editing and Publishing

The Calendar of Events is a system within Concierge Admin that helps manage the Store's workshop calendar. You can create and publish workshops that will be listed on your Store's public web page, the Apple Store app, and the One to One member page. Workshops include Camp, Joint Venture, Open Training, Special Events, and standard workshops created by your team. This is a time critical task and must be finished by the 15th of each month.


Monday, May 13, 2013
8:00 a.m. – 9:00 a.m.
Discover Your iPad
Come learn about iOS 6, built-in apps, iCloud, the App Store, and more. We know iPad will become your new favorite way to do just about ever... Read more
Reserve
9:00 a.m. – 10:00 a.m.
Discover Your iPhone
Let us show you some of the features of iOS 6 and built-in apps that make the everyday things you do even more incredible with iPhone.
Reserve
4:00 p.m. – 5:00 p.m.
Discover Your Mac
We're eager to show you some Mac basics and share some tips and tricks. Come see how easy it is to get started, stay organized, and get the... Read more
Reserve

The Calendar of Events within Concierge Admin displays events that can be viewed up to three months in the past and two months into the future.

This guide will take you through the basic steps of accessing and editing your workshops.

Getting Started

Log into Concierge Admin and click Workshops menu from the "Your Store Name" in the menu bar.

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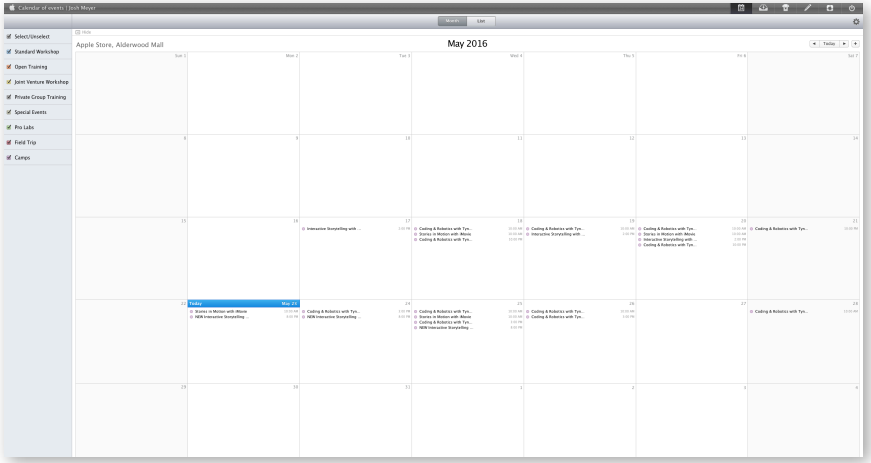
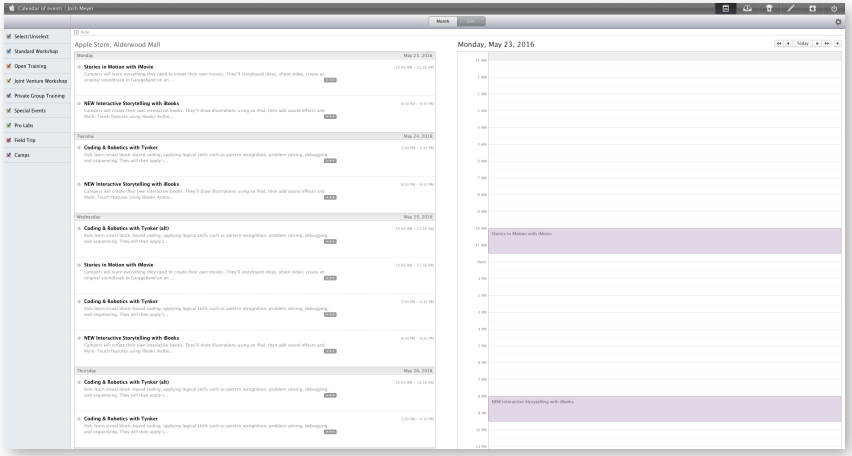


The Calendar of Events lists all the workshops scheduled for your Store. There are two views, Month and List, located near the top of the screen. Events can be filtered using the check boxes on the left side of the screen. To edit an already published event, double click the item listed on the calendar.



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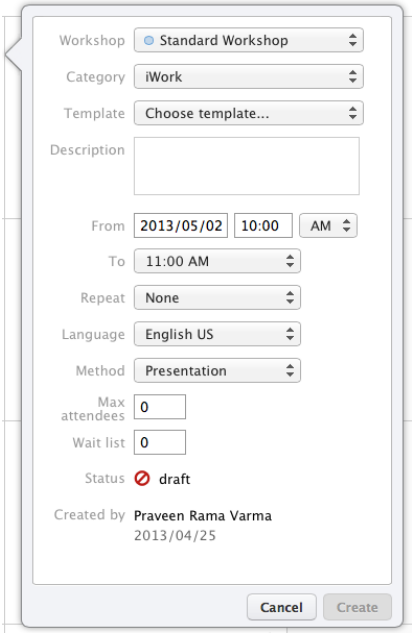
1. In order to create a new event, double click the desired day of the calendar or click the Add (+) button in the upper right of the unpublished calendar.
2. Set the desired Event Information using the Workshop, Category, and Template menus. Once set, a description of the workshop will appear.
3. Set the start and end times, using both hours and minutes, e.g. 2:00.
4. Use the Repeat drop down to choose how often the event repeats.
5. Choose the Method, depending on the type of Event.
6. Set the Max number of attendees.
7. Click Create to add the event to your calendar.



Once you have finalized the Calendar for the month, click the Action button in the upper right hand corner and choose Publish calendar. Remember to publish before 11:59 p.m. on the 15th of each month. If you do not publish your calendar in time, your Store will be notified by email that the calendar has not been published.

Important Note: Customer facing events will not be visible until the calendar has been published.

Events

Concierge allows you to add Events to your Store's calendar.

1. From within the Calendar of Events, click the Action button (gear) in the upper right and select Request event.
2. Select the desired Category, Language, Title, and Description.

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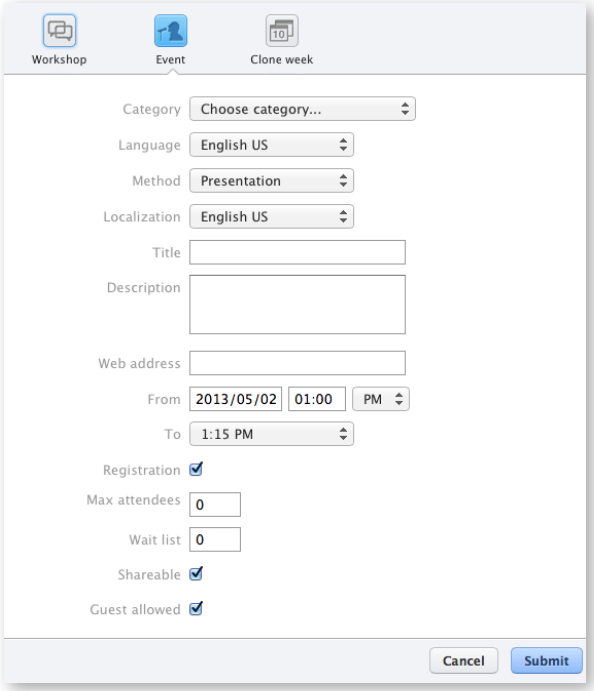
3. Set the time and date as needed.
4. Choose if Registration is required.
5. Set the Max number of attendees.
6. Click Submit.



Note: *Publishing the event does not automatically mean that it is published in Concierge or to your Store's website. The event will go through an approval process before appearing on your website. The approval process for Events can be monitored under Store Inspector > Approval Request.*

Field Trip

Field Trip is a great opportunity for your team to showcase our technology to local schools and other youth-oriented groups. The majority of Field Trip requests will be completed by the customer via web browser, but can also be manually entered.

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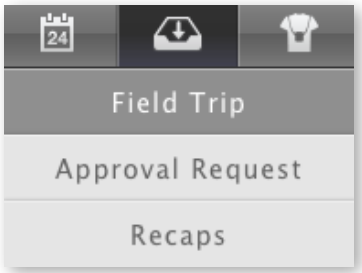
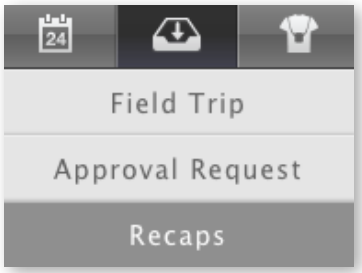
1. Select Store Inspector > Field Trip.
2. Input all required data, including name, phone, Email, School name, and school zip.
3. Choose the correct school type and Event Type.
4. Set the date and times.
5. Click Create



Event Recap

An event recap is required for any event held in the Store.

1. Select Store Inspector > Recaps.
2. In the Search field, type your Store.
3. Complete the Recap Information form completely. Specific feedback is critical because this information is used to improve future events.
4. Click Submit.



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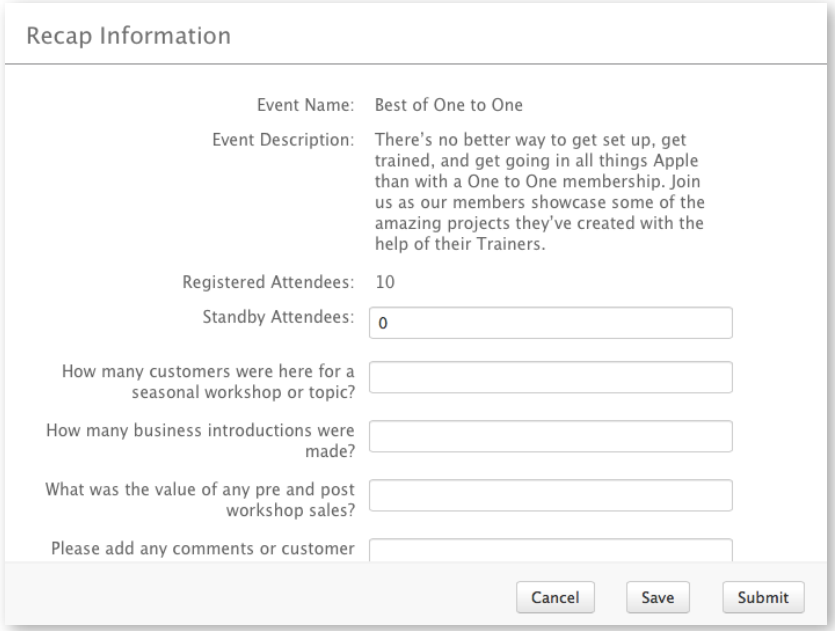
Recap Information
Event Name:
Best of One to One
Event Description:
There's no better way to get set up, get trained, and get going in all things Apple than with a One to One membership. Join us as our members showcase some of the amazing projects they've created with the help of their Trainers.
Registered Attendees:
10
Standby Attendees:
0
How many customers were here for a seasonal workshop or topic?
How many business introductions were made?
What was the value of any pre and post workshop sales?
Please add any comments or customer
Cancel
Save
Submit

Editing and Publishing Open Training

Open Training sessions are 90 minute blocks of time for One to One members to work individually on whatever project they can dream up, with a Trainer available to answer questions. These sessions need to be added to the Store's calendar every day of the week.

1. Double click the desired day on the calendar or click the Add (+) button in the upper right.
2. Choose Open Training and the desired Template.
3. Set the appropriate times, Repeating schedule, and Method.
4. Set the Max Attendees between three and six depending on Store size and space.

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After creating sessions, publish the calendar so customers will see available sessions on the website.

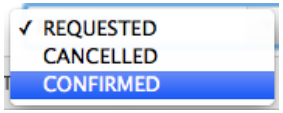
Scheduling Requested Training for Joint Venture Members

Joint Venture customers who are granted admin privileges are able to schedule up to three two-hour sessions of training at the Apple Store for their employees. Our trainers will lead hands–on workshops on a wide variety of topics. After the customer requests a Company Training session, the Business team is notified via email and needs to verify and schedule the training.

1. Using Concierge Admin, Select "Your Store Name" > Company Training from the menu bar.
2. Select the Company Training request that you would like to confirm by clicking the topic name.
3. Verify the Training Location, date and time, topic, and contact person.
4. Add any Store Comments that may be necessary.
5. Click Save to capture the information.
6. Select Confirm to save and schedule the workshop.

   Note: *Clicking Confirm will save all the information. Once a request as been confirmed, the information can no longer be modified.*

7. To verify the Company Training has been confirmed, select Confirmed from the status pull-down menu.



   Note: *To ensure your Store's Creative and Business teams have the resources available to meet the needs of our Joint Venture customers, Company Training Workshop requests can only be scheduled at a minimum of two weeks out. Once the reservation has been confirmed, the workshop can be viewed in the Program Workshop listing from the left reservation bar of the Dash. See Managing Workshops for more information on how to open, close, or cancel a Company Training Workshop.*

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